



Metro Transit

COVID-19 Tracking Survey

May 2020



Background and Objectives

On Metro Transit's behalf, CCF has partnered with S² (a partnership between Susan DeSimone Inc. and The Insight Scout) to help understand rider sentiment and barriers to return to using Metro Transit service when it is open beyond essential travel.

Specifically, the team would like to understand:

- Sentiment toward using mass transit over time
- Emotional barriers/concerns related to returning to ridership and how they might change over time
- Questions riders have about the new riding experience over time
- Messages that will best help overcome rider concern over time

Methodology

- Online survey was conducted with 435 Metro Transit riders between May 18-19, 2020.
- The Metro Transit Go-To Card database was used to recruit riders for the study.

Respondents were recruited to reflect the following:

- Age 18+ years
- Have ridden Metro Transit within six months prior to Mid-March (essential service only)
- Have not ridden Metro Transit since Mid-March
- Previously rode Metro Transit a few times per week or more often

Respondent Profile*

Respondents for this survey were fielded using the Metro Transit Go-To Card database which is not a mirror image of the Metro Transit rider. Example of differences are:

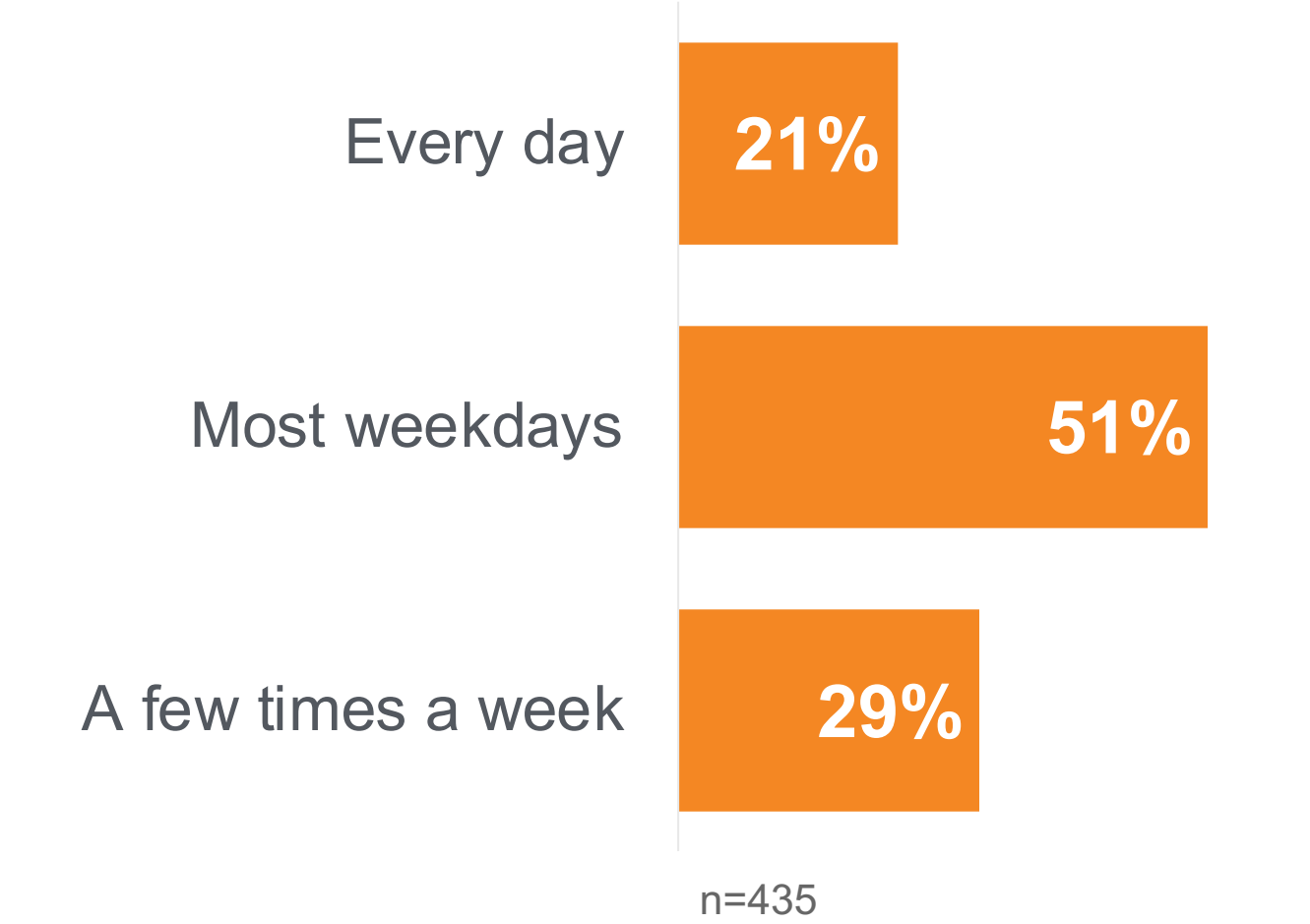
- Persons of color 45% (System) vs 15% (This survey)
- Primary rider ages 18-34 51% (System) vs 33% (This survey)
- HHI > \$100 28% (System) vs 37% (This survey)

*Additional Information can be found in the full report.

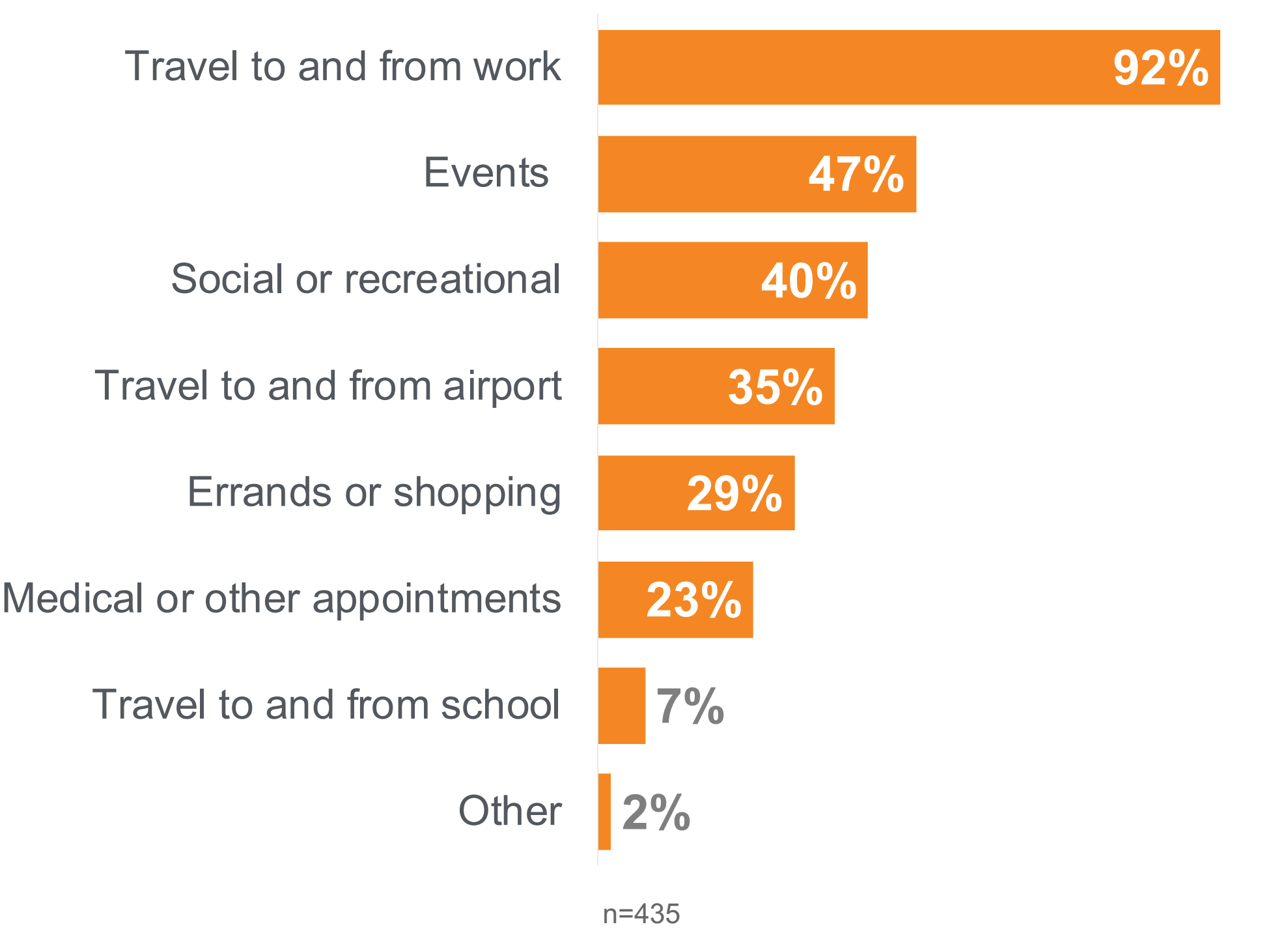
Metro Transit Use Prior to COVID-19

Nearly all of these frequent Go-To Card users (92%) use Metro Transit to commute, but also for a variety of other occasions.

Typical Metro Transit Use Prior to COVID-19



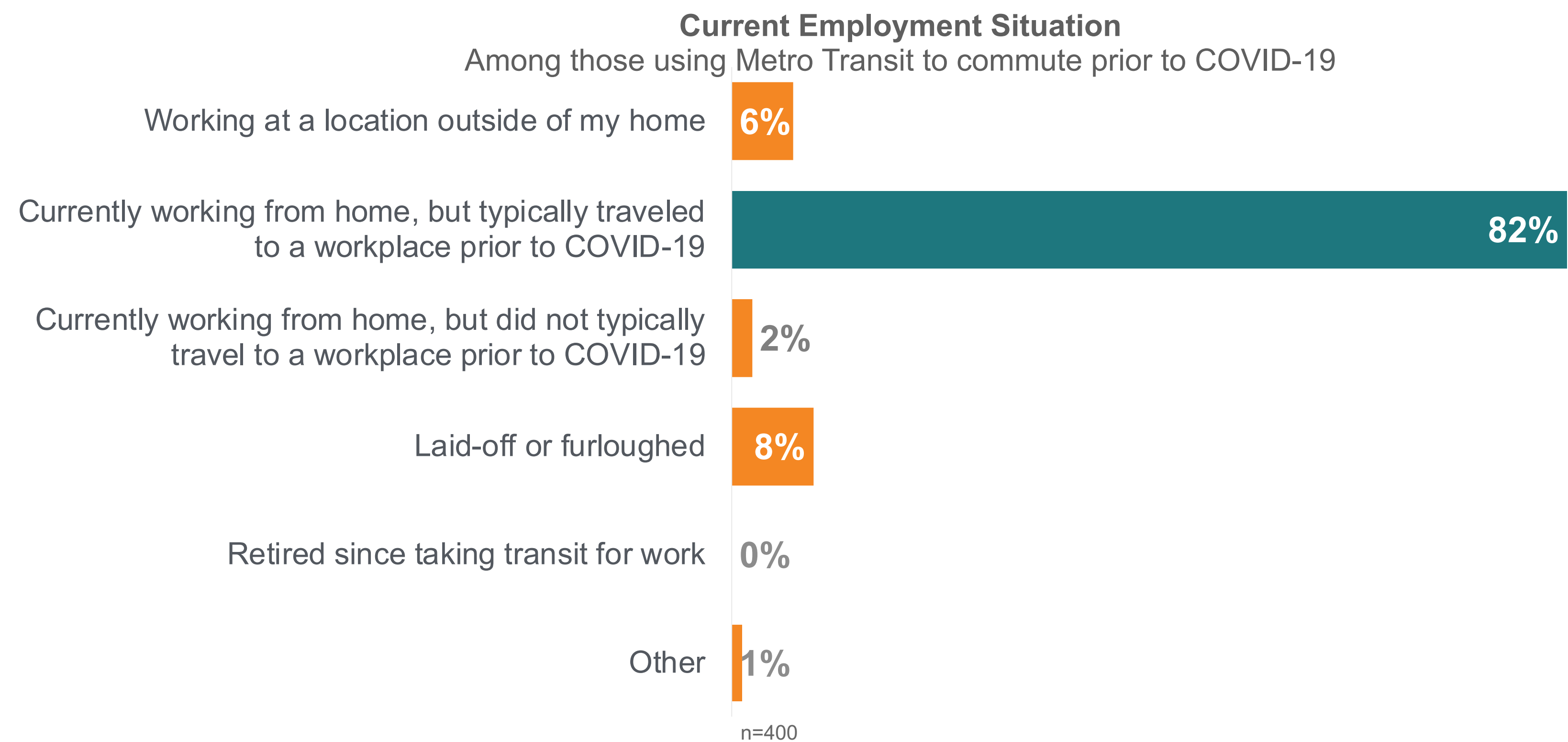
Occasions Used Metro Transit Prior to COVID-19



S7 How often would you say that you typically used Metro Transit prior to the impact of COVID-19? Q2 For which types of occasions have you taken the bus or light rail in the last six months before COVID-19? (Select all that apply)

Current Employment Situation

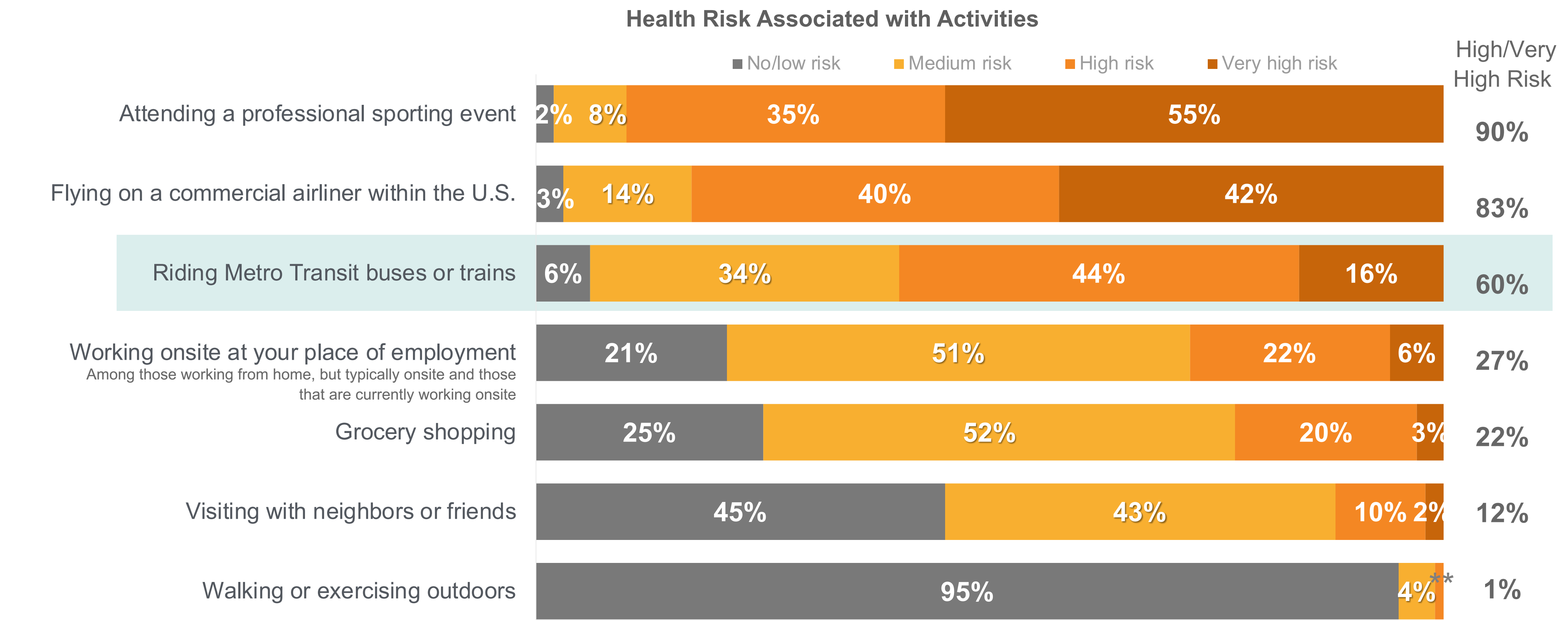
Likely because the majority are 9-5 office commuters, four in five of respondents are currently working from home, but worked onsite prior to COVID-19. Only 6% are currently traveling to work using means other than Metro Transit.



Q4 Which of the following best describes your current employment situation due to COVID-19? I am currently:

Health Risk Associated With Activities

Three in five see riding Metro Transit as high risk right now. Of the activities asked about, it is seen as the highest risk activity in their daily routine. Only commercial flying and professional sporting events are perceived to have higher risk.



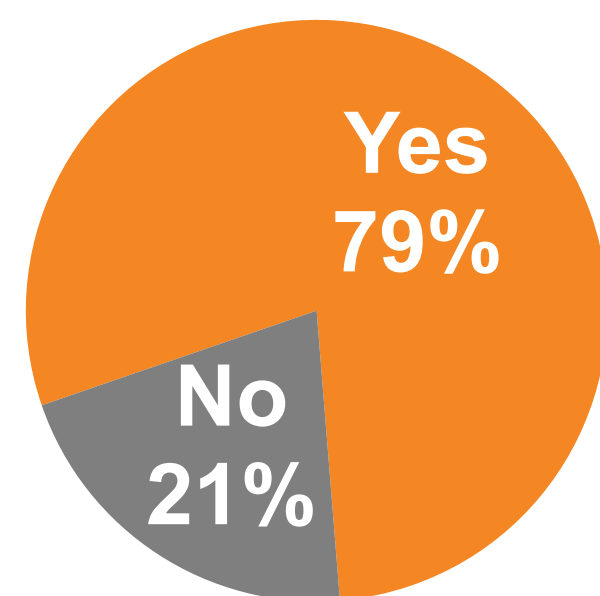
n=435 *=1% or less

Q10 In thinking about the possible risk of COVID-19 infection to you personally, how much risk do you think participating in each of the following activities poses?

Concerns About Returning and Confidence Factors

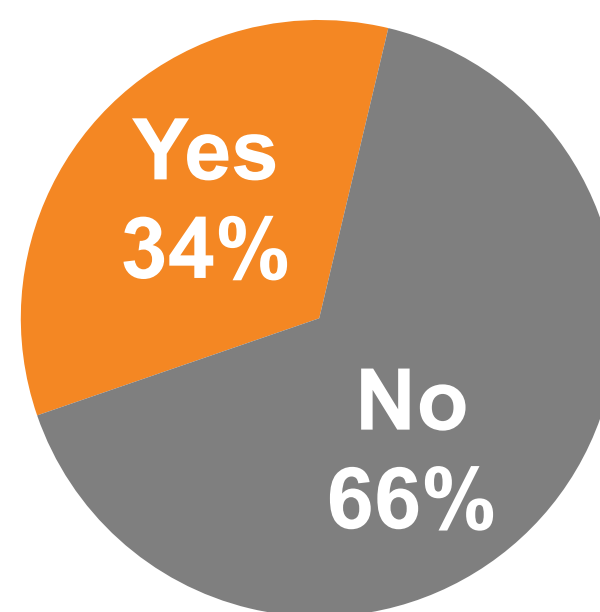
While nearly all say they will return eventually, four in five have COVID-19 related concerns, but more than one-third have other concerns. A vaccine provides the most confidence to return, but 57% of those with COVID-19-related concerns say understanding Metro Transit actions to make riding healthy is meaningful.

COVID-19 Concerns About Returning to Metro Transit



n=435

Non-COVID-19 Concerns About Returning to Metro Transit

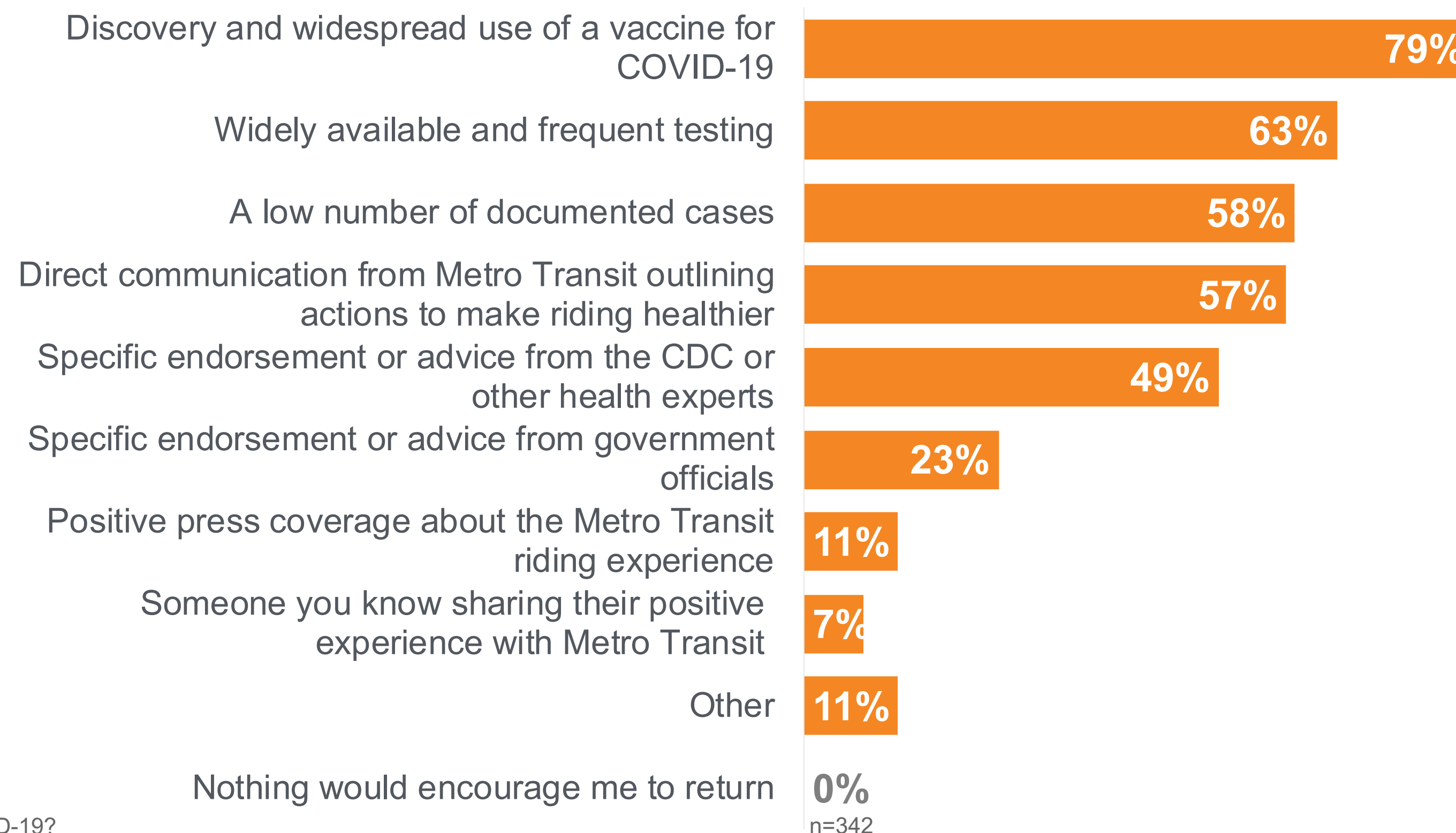


n=435



Would Give Confidence to Return to Metro Transit

Among those who have COVID-19 concerns



n=342

Q11 In thinking about returning to Metro Transit use, do you have any concerns directly related to COVID-19?

Q12 Which of the following would give you confidence to return to using Metro Transit services without significant concern? (select all that apply)

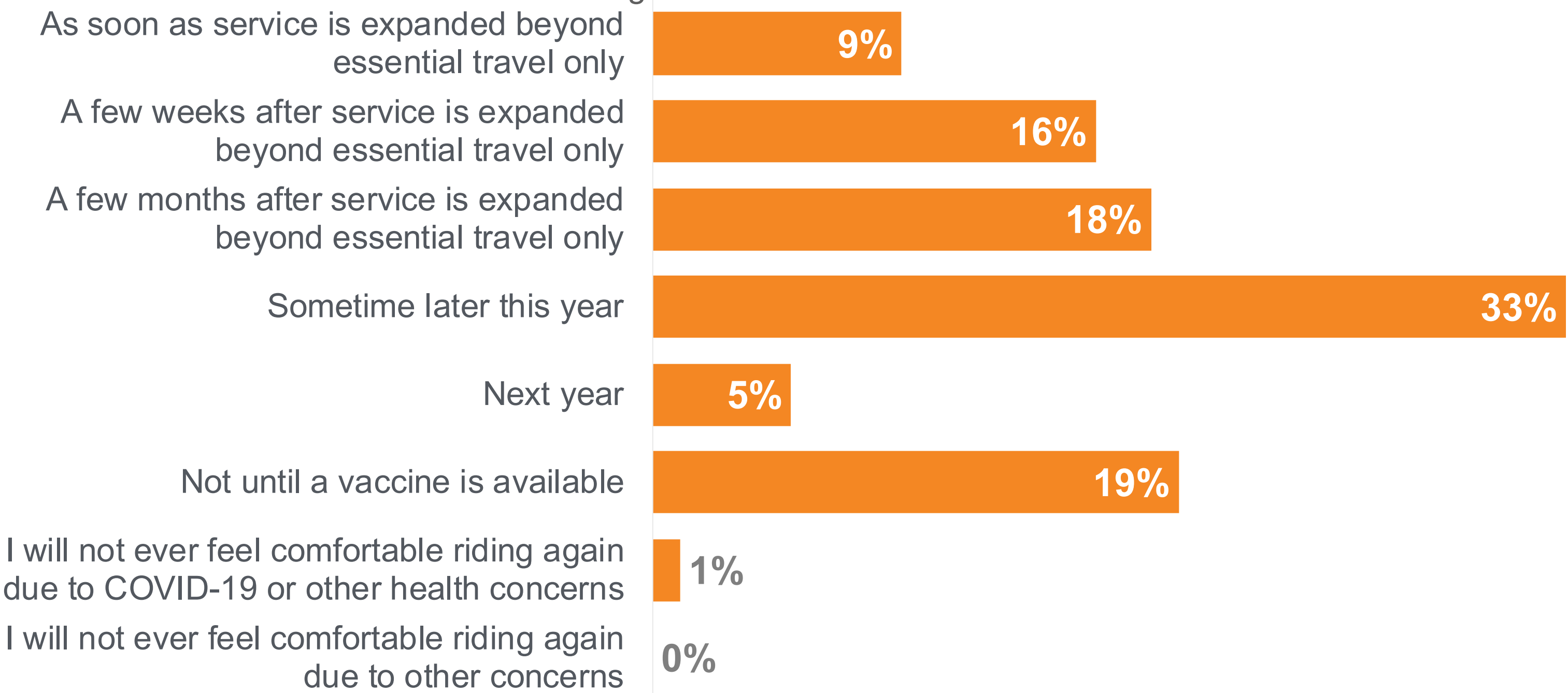
Q13 In thinking about returning to Metro Transit use, do you have any concerns not directly related to COVID-19?

Expected Return to Metro Transit Use

Metro Transit should expect former regular riders to return gradually. Less than one-third will return to Metro Transit for commuting or other occasions within a few weeks of service expansion. Nineteen percent say they do not expect to return to commuting without a vaccine.

Expected Return to Metro Transit (groups not mutually exclusive)

Commuting: Among those that use to commute, but are now working from home

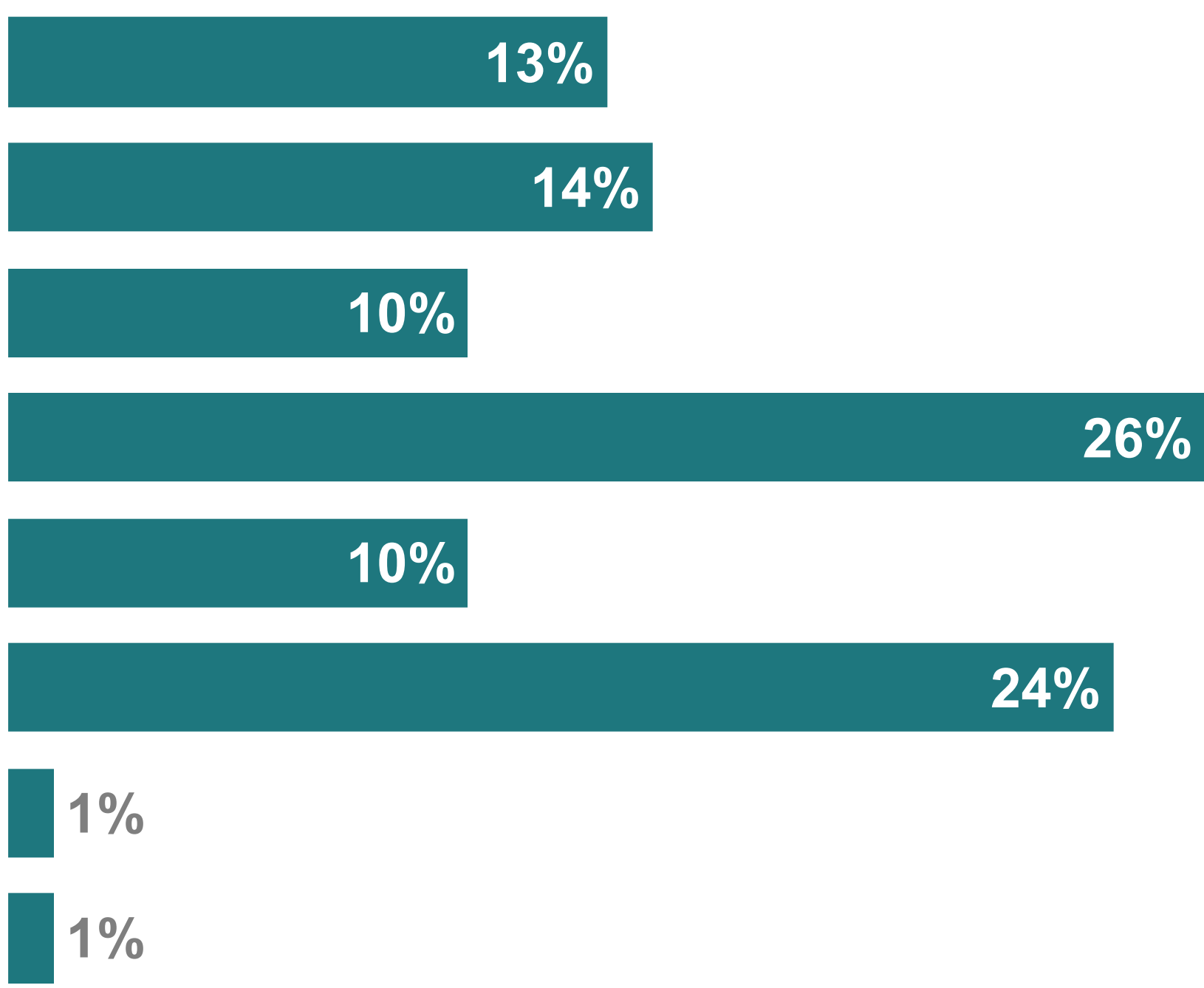


n=352

Q7 Based on what you know today, when do you estimate that you might resume **commuting** to your workplace using Metro Transit services once it is allowed?

Q8 Based on what you know today, when do you estimate that you might resume using Metro Transit services for trips other than work commutes?

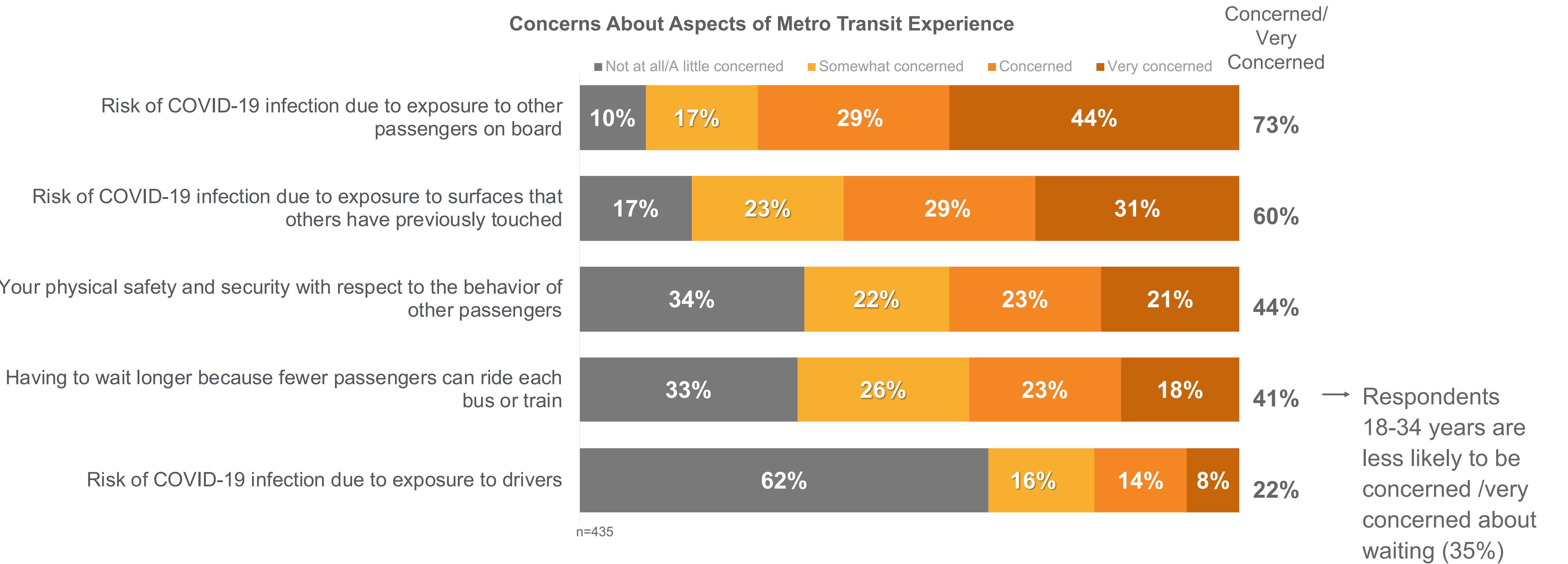
Occasions Other Than Commuting: Among those who used Metro Transit for trips other than commuting



n=301

Concern About Aspects of Metro Transit Experience

Regular riders are most concerned about infection from other passengers (73%) compared to surfaces (60%), but more than half as many say that they are concerned about their physical safety and security (44%) due to passenger behavior.

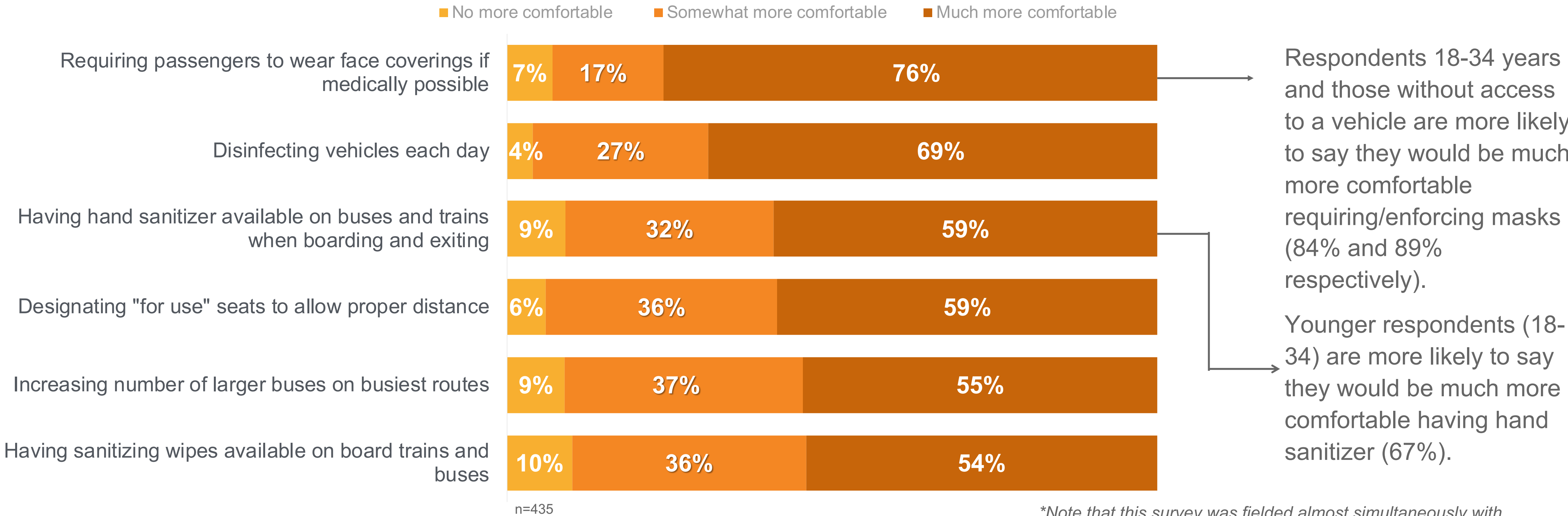


Q16 How concerned are you about each of the following as it relates to riding Metro Transit once service is open beyond essential trips?

Factors That Increase Comfort in Returning —Top Six

Requiring passengers to wear face masks* creates the highest level of comfort returning to Metro Transit use (76% much more comfortable) followed by frequent disinfection of vehicles (69%). Boarding through the rear of buses has the least significant impact (24%) as seen on the next page.

How Much More Comfortable Returning

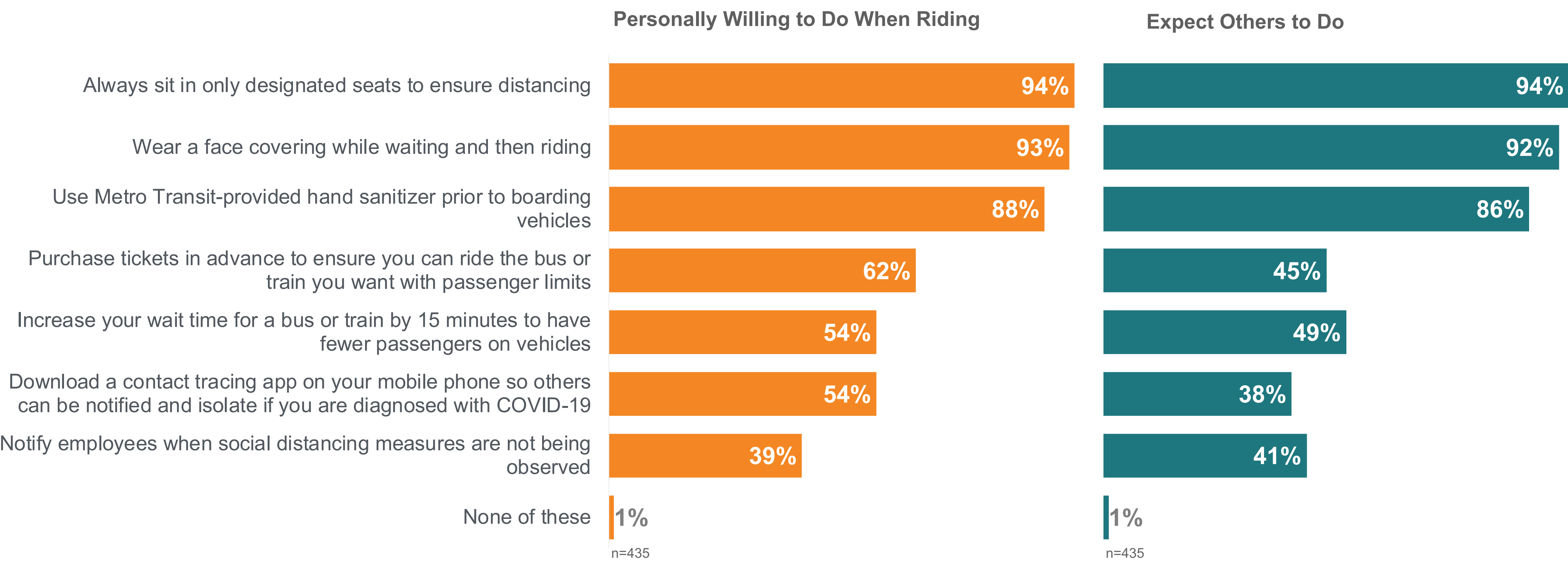


Q19 How much more comfortable would each of the following make you about returning to riding Metro Transit once service is expanded beyond essential trips only?

**Note that this survey was fielded almost simultaneously with Metro Transit’s announcement on May 15th that masks would be required starting May 18th.*

Personally Willing and Expect Others to Do When Riding

There is a nearly universal level of willingness and expectation of others to sit in designated seats, wear masks and use provided hand sanitizer. More than half say they are willing to purchase tickets in advance and download a contact tracing app, but have lower expectations of others.



Q20 Which of the following would you be personally willing to do in order to help Metro Transit riders and employees stay healthy? (select all that apply)

Q21 Which of the following would you expect others to do in order to help Metro Transit riders and employees stay healthy? (select all that apply)

Key Findings

- Riders show a significant level of health-related concern about returning to Metro Transit use, but concern about physical safety and violence should also be taken seriously.
- Riders will likely return in phases and full return to riding could take some time.
- Metro Transit is trusted to do all it can and to do what it is promising. Being transparent with what you are doing is important. Consistently communicating these measures is very important to riders.
- Requiring masks and frequent cleaning of buses and trains are the measures that Metro Transit is taking to most to ease concerns. Evaluating and implementing other measures (slide10) can go a long way to allay concerns.
- Enforcement of social distancing policies is desired, especially because many are uncomfortable or unwilling to confront or report those not complying.
- Messaging that encourages all to do their part drives the most positivity and should be explored.

Initial Recommendations

- **Focus significant effort and investment on communicating Metro Transit measures to keep riding healthier and safer. Create a sense of community and responsibility to ride safer and healthier.**
- **Consider new ways or educate about app feature so that riders can confidentially express discomfort or signal for help when riding or waiting.**
- **Educate about and help riders learn to use technology tools like the app to help them stay connected and better informed about measures being taken and the latest Metro Transit news.**

Next Steps

- **Conduct focus groups in early July with:**
 - **Already returned riders**
 - **Nearer term return riders**
 - **Longer term return riders**
- **Gather input from senior staff to include in focus groups**
- **Field quantitative “pulse” survey again in late July to gauge changes in rider sentiment**

Thank You.